



THE ECONOMIC IMPACT
OF HERITAGE TOURISM IN

Texas

TEXAS HISTORICAL COMMISSION
real places telling real stories

A UT/Rutgers survey of participating sites indicated that the Texas Heritage Trails Program increases revenue and visitation by 13.9%. But without immediate action, the benefits and infrastructure created by this unique partnership will be lost!

According to studies conducted for the Governor's Office of Economic Development and Tourism, in 2014 **direct travel spending in Texas exceeded \$70.5 billion**. Travel spending has increased every year from 2002 through 2014, and this growth is projected to continue. National studies tell us that at least 10 percent of direct travel spending results from heritage travel. In Texas, a recent study conducted by Rutgers University in partnership with UT Austin tells an even more impressive story, with **\$7.3 billion resulting from expenditures by heritage travelers annually**. Even reducing this figure to calculate the specific economic impact of those visitors' heritage related activities alone would result in a total expenditure of \$2.3 billion, still a significant amount.

Allocating only 10 percent of travel spending to heritage tourists is very conservative. **The City of San Antonio considers over 58 percent of their overnight visitors to be "heritage visitors," and 47 percent of their day trippers fall into that category**. In 2015 the city released a study on the impacts of these visitors, and concluded that **they spend nearly \$2.5 billion each year, supporting over 14,000 food and beverage workers, nearly 12,000 retail employees, and 9,000 workers in hotels, motels, and B&Bs**. (*Place Economics, Historic Preservation: Essential to the Economy and Quality of Life in San Antonio*, February 18, 2015).



NATIONWIDE TRENDS

Colorado's 2011 report on the impacts of historic preservation concluded that **approximately half the overnight leisure trips to Colorado (11.8 million trips) involve heritage tourism activities** (*The Economic Power of Heritage and Place—How Historic Preservation is Building a Sustainable Future in Colorado*, 2011).



A Colorado tourism report stated that, "consistent with past years, **interest in historic places topped the list of specific draws for Colorado vacationers in 2013**, followed by an interest in cultural activities and attractions." (*Longwoods International, Colorado Travel Year 2013, 2014*).



Florida estimated heritage tourism as a \$4.13 billion industry in 2008. **46.7% of all travelers to Florida visit historic sites** (Center for Government Responsibility, University of Florida, and Rutgers, *Economic Impacts of Historic Preservation in Florida*, Update 2010).



Conductor, Hill Country Flyer Steam Engine.



In Pennsylvania, the state's "heritage area" program draws **26 million visitors each year, generating around \$1 billion in visitor spending** (*Econsult and Urban Partners, Inc., Economic Benefits of Historic Preservation in Pennsylvania*, 2012).





Parker County Peach Festival, Weatherford.

In Georgia, **heritage travel is a “major priority” for 26% of their domestic leisure visitors** (although they represent 45.1% of leisure traveler expenditures) and 27% of international visitors (who represent 28.9% of international visitor expenditures). **These travelers spend more than \$6 billion annually**, supporting 117,000 jobs (*Place Economics, Good News in Tough Times: Historic Preservation and the Georgia Economy*, 2010).



In 2014 Texas had approximately **243 million domestic visitors in Texas during 2014**. The Texas **average party per trip spending was \$770 in 2013**. For those parties visiting historic sites, **the average is \$1,331 or \$561 more than the typical party of visitors**. (Office of the Governor, Economic Development and Tourism).



A Route 66 travel study (including the Texas panhandle) reported “when multiplier effects are taken into account from the \$132 million annual Route 66 investment, the total annual impacts to the nation include a **net economic gain of 2,401 jobs, \$90 million in income, \$262 million in overall output, \$126 million in Gross Domestic Product (GDP), and \$37 million in tax revenues**” (Rutgers, *Route 66 Economic Impact Study*, 2011).



A study of international tourists to the United States showed that **4.1 million more international travelers visited a historic place** than went to the beach. Four times as many went to a historic place than to a casino or a golf course.



THTP Success Story FOREST TRAIL REGION: REGIONAL WORKSHOPS



Based in Nacogdoches, the Forest Trail Region serves 35 counties in East Texas, from the Red River to the Gulf Coast. The region represents a diverse range of cities and towns with equally diverse resources and assets. The Forest Trail Region provides training workshops, educational summits, and webinars for partner members, regional tourism professionals, and those interested in promoting and supporting heritage preservation and tourism.



Roses are abundant in Tyler, “The Rose Capital of America.”

Since 2008, the Forest Trail Region has conducted more than 43 regional workshops including eight annual summits and 35 Toolkit Workshops. These meetings bring members and special guests from across the region together for learning,

networking, and partnership building. Workshop panels include presentations from industry leaders about best practices for marketing communities, tips to increase visitation to historic sites and attractions, and marketing research presentations.

The Toolkit Workshops are planned corroboratively with regional partners and are designed to meet the individual needs of the community. Topics have covered technology and social media, hospitality and customer service, small business and economic development, destination tourism, heritage preservation, and marketing and graphic design tools.

In 2014, the Forest Trail Region began offering partners access to the Roger Brooks Library, a vast video library with a range of titles covering economic development topics including branding, tourism, and community development.

As an effort to connect with the next generation of tourism industry leaders, the Region has developed a strong partnership with Stephen F. Austin State University. Through the collaboration, 21 Forest Trail Region partners participated in a free marketing research project conducted by hospitality students. In 2015, the Forest Trail Region also provided six students scholarships to attend the Texas Travel Industry Association Summit in Galveston.



Native American dancer, Alabama-Coushatta Indian Reservation.

THTP Success Story

TEXAS PLAINS TRAIL REGION: THE QUANAH PARKER TRAIL



The Texas Plains Trail Region spans Texas' Panhandle, encompassing 52 counties across 50,000 square miles. In 2010, the Texas Plains Trail Region developed a grass roots initiative for the Quanah Parker Trail to honor the untold story of Quanah Parker, the Quahadi Comanches, and Native American life in the region. The program is part public art installation, part historical marker, part commemoration, and part roadside icon.



The Quanah Parker Trail began highlights places where visitors can view Comanche artifacts, locations of famous camps and battles, and routes used to traverse the region in search of bison.

The architects of the Quanah Parker Trail chose a soaring steel arrow to be used as a visual marker for sites along the trail. A New Home (Lynn County) gin owner and metalsmith offered his artistry at no

fee to sites wishing to participate in the trail by undertaking rigorous research on their Comanche history, applying to the project, and covering the modest cost of arrow delivery and setup. What was initially planned as a network of 12 arrow markers is now more than 80, representing sites in almost all of the Texas Plains Trail Region's 52 counties. Quanah Parker trail leaders have been cultivating research and relationships and anticipate completing the trail sites this year.



Tribute to local World War II soldiers at the Garza County Historical Museum, Post.

Visitation related to the Quanah Parker Trail has increased inquiries at local museums, media coverage, and attendance at dozens of installation and dedication events held each year. The project has generated thousands of hours of community engagement from hundreds of participants and tens of thousands of dollars in in-kind support over the past five years. All regions in the county have benefitted economically through hotel/motel tax, local meals, and additional local purchases. Furthermore, the trail has become a unifying theme of heritage tourism in the region and a point of pride for small communities.

In Jayton (population 534) a retirement home brands itself in commercials as being "On the Quanah Parker Trail." The Quanah Parker Trail is a magnet for other tourism development in cities and towns of all sizes.



Above left: Quanah Parker, the last chief of the Quahada Comanche Indians;
Above: Quanah Parker Trail dedication, Mobeetie;
Right: Quanah Parker Trail marker on the grounds of the Hardeman County Courthouse.



THE TEXAS HERITAGE TRAIL REGIONS

Clearly, heritage tourism is an important part of the tourism economy in states across the nation.

What infrastructure supports this dynamic and growing market sector? **Heritage travel in Texas owes its success to the Texas Heritage Trails Program administered by the Texas Historical Commission (THC).**

Heritage tourism is part of the state tourism office's statutory mandate through Texas Government Code 481.172(a)(3) requiring the office to "encourage travel by Texans to this state's scenic, historical, cultural, natural, agricultural, educational, recreational and other attractions." The THC is named in subsection (a)(8) of that statute as one of four state agencies required to work closely with the tourism office through the MOU process to provide "the most effective and efficient expenditure of state funds for in-state marketing activities conducted by the agencies and encouraged by the office and out-of-state marketing activities conducted by the office." (Texas Government Code 481.172(b)(3)(A).)

Since 1998, the THC's Heritage Texas Trails program has been the primary source of heritage tourism information for the traveling public. This remarkable and highly successful public/private partnership consists of 10 heritage regions covering all 254 Texas counties, each operated by its own nonprofit board of directors,



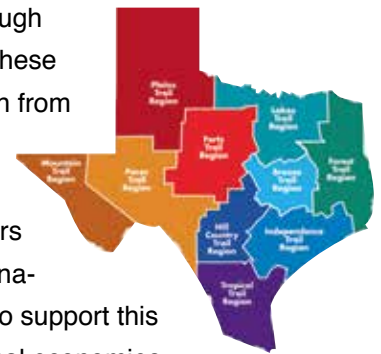
Exhibits at the Alamo, San Antonio.

coordinating their efforts through a central office at the THC. These boards include representation from city and county government, economic development offices, convention and visitors bureaus, and individual destinations, all donating their time to support this critical component of their local economies.

These board members and hundreds of other volunteers dedicate an enormous amount to this effort, providing **more than 70,000 volunteer hours since 2006, with more than 12,000 hours donated in 2014 alone.**

In the 10 regional offices, each board manages tourism activities through a paid Executive Director

(ED) employed by that board. The ED maintains the region's website, coordinates local activities, provides joint marketing opportunities, seeks outside funding, and acts as a liaison between the region and THC heritage tourism staff.



Fourth of July celebration at the Randall County Courthouse, Canyon.

TRAVELERS' EYE-VIEW

For visitors, the journey begins online where TexasTimeTravel.com provides access to information on thousands of historic sites either by theme or by route.

Texas Time Travel's online promotions generated more than 175 million impressions since 2011 including more than 560,000 users who clicked on banner ads.

But TexasTimeTravel.com is only a conduit to the websites for each trail region where users will find information about heritage attractions across the urban and rural landscapes of Texas. **Since June 1, 2013, TexasTimeTravel.com and the 10 regional trail websites have received more than 300,000 unique views.** Google Analytics for TexasTimeTravel.com suggests that at least 110,000 of those visits came from agency-placed online advertising banners and other advertising on thematic sites. High referral numbers from popular search engines (Google organic generated more



than 50,000 referrals) and more than 38,000 sessions from visitors typing in the domain to their browser, suggesting that print and online



Kids check out a stagecoach driven by reenactors at a Fort Lancaster State Historic Site event, Sheffield.

efforts have resulted in successful brand recognition for the campaign.

Travelers planning trips can download electronic brochures, or order print copies. **More than 7 million copies of these popular guides have been distributed to date**, and despite the popularity of digital products, demand for the printed guides continues.

Once on the road, travelers have the advantage of **more than 10,000 iconic blue and white highway signs** guiding them along the Trails. And this system is literally “on the map” when travelers use their smartphones, because the **Texas Trails are clearly identified in the popular iPhone wayfinding system.** The Trails network is also the basis for other heritage travel products such as the THC's recent publication *Hispanic Texans: Journey From Empire to Democracy*. **More than 227,000 copies** of the companion

publication, *African Americans in Texas: A Lasting Legacy*, have already been distributed. The companion Texas Time Travel Tour web app launched in 2015. Six new tours featuring other Texas heritage sites are scheduled to be available by the end of this fiscal year, all using the Texas Trail regions as their geographic basis.

Upper left: Sack race at an October festival, Caddo Mounds State Historic Site; Right: Visitors at the Buffalo Soldiers Museum, Houston.

Although at least 10 percent of Texas travelers visit heritage sites, the economic impact of heritage tourism can't be measured just by attendance at those sites. Estimates indicate that **less than 7 percent of a heritage traveler's total expenditures will happen at the historic site**

itself. So where are they spending their money? Heritage travelers stay longer and spend more than the average traveler, and local restaurants, lodging facilities, Main Street businesses, and local festivals and theatrical performances get that benefit. These

travelers also tend to have higher incomes, so it's great to know that this travel segment is one of the fastest-growing in the industry.



Eisenhower Birthplace State Historic Site



Left: Heritage tourism sign outside of Turkey; Below: Historic theater, Denton.



THTP Success Story TEXAS LAKES TRAIL REGION: NORTH TEXAS HORSE COUNTRY TOURS



The Texas Lakes Trail Region is home to the North Texas Horse Country, one of the largest concentrations of horse farms in the United States. Large breeding farms, training facilities, and equine specialists can be found in abundance, and have created a real center for professional horsemen and horse enthusiasts from all over the world.



In partnership with the Denton Convention and Visitors Bureau, the Texas Lakes Trail Region worked to create a regular schedule of North Texas Horse Country Tours, which are rooted in the history of the region.

These tours offer visitors tours of the horse country or online self-guided tours of the attractions. The tours themselves are one of the area's primary products in the group tour marketplace. As many as 70 or more person motorcoach tours are hosted every year. While many visits are day trips, the overnight visitors staying in Denton and nearby towns generate an impact on lodging, restaurants, and other area attractions.

Additionally, the Denton Convention and Visitors Bureau offers six public tours at the local level every year. The tours have transformed into a powerful ambassador-building tool, and foster a local appreciation of the value and significance of this beautiful and important historic, cultural, and agricultural resource.



Above: Pioneer Park, Dallas; Below: North Country Horse Tour, Denton.



NEXT STEPS FOR THE TEXAS HERITAGE TRAILS

Without immediate action, the infrastructure created through this unique partnership will be lost! \$1.3 million in funds provided for the Trails program through interagency agreements including Office of the Governor-Economic Development and Tourism were discontinued in 2011. Federal highway enhancement funds via Texas Department of Transportation grants (providing more than \$10 million in support for this program since 1999) are no longer available for these purposes. Stop-gap funding for the 10 Trails regions will run out by January of 2016

An investment by the state in the amount of \$2.5 million would provide enough funding to maintain this critical partnership through FY2017, including support for the Trail Region staff, reprinting seven tour brochures currently or soon out of print (estimated to be a

five-year supply), continuing website hosting/content development, and ongoing marketing efforts for the TexasTimeTravel.com and Texas Heritage Trail brands. Ongoing funding at \$1 million per year thereafter would allow this statewide program to continue intact, with cyclical increases necessary to cover the ongoing need to revise and reprint associated publications.

The State's commitment to tourism produces a significant return on investment—and heritage tourism is a critical component of that ROI. The THC requests your support for the only statewide program that celebrates Texas heritage and builds the state's economy—the Texas Heritage Trails Program!



Top middle: *La Belle*, now on display at the Bob Bullock State History Museum; Above: A tour of the Magoffin Home State Historic Site, El Paso.



USS Texas, San Jacinto



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www.thc.state.tx.us